

Trailer and Cargo Container Tracking

Trailer and Cargo Container Tracking is the fifth consecutive report from Berg Insight analysing the latest developments on the trailer and cargo container tracking and security market worldwide.

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Highlights from this report:

- **Insights** from 40 new executive interviews with market leading companies.
- **Comprehensive** overview of the real-time cargo tracking value chain and key applications.
- **In-depth** analysis of market trends and key developments.
- **Summary** of major cargo tracking initiatives from the EU and the US.
- **Updated** profiles of 86 container tracking solution providers.
- **Detailed** forecasts by market vertical lasting until 2020.

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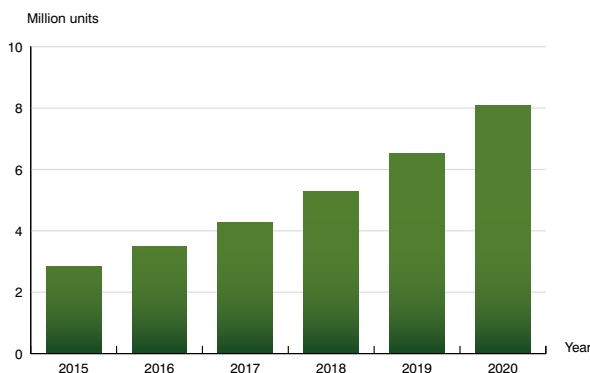
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The installed base of active cargo tracking units has reached 3 million

Trailer and cargo container tracking is a subsegment of asset tracking and aims to increase operational efficiency and make logistics chains more secure. Berg Insight's definition of a real-time tracking solution is a system that incorporates data logging, satellite positioning and data communication to a backoffice application. Trailer tracking can be part of fleet management solutions including both trucks and trailers. The history of fleet management solutions goes back several decades while tracking and monitoring of shipping containers came in focus after 9/11. Today, mobile and satellite networks can provide ubiquitous online connectivity at a reasonable cost and mobile computing and sensor technology delivers high performance as well as excellent usability. All of these components combined enable the delivery of supply chain management, security management and operations management applications linking trailers, containers, cargo and enterprise IT systems.

In order to make freight transport efficient, products are packed into collective logistics units which can remain intact throughout the delivery chain. Smaller logistics units such as boxes and pallets are often grouped into larger units and loaded on semi-trailers, swap bodies, air freight unit load devices (ULDs) or intermodal shipping containers. These loading units can be applicable to one or more modes of transport. Semi-trailers are mostly used in road transport, swap bodies can be transferred between road and rail transport, ULDs are used in air freight transport and shipping containers can be carried on several transport modes. More than 20 million intermodal containers and over 13 million trailers are in use worldwide.

Berg Insight estimates that shipments of remote tracking systems with cellular or satellite communication capabilities for cargo loading units including trailers, intermodal containers, air freight cargo containers, cargo boxes and pallets reached 0.8 million units worldwide in 2015. Growing at a compound annual growth rate of 25.0 percent, the shipments are expected to reach 2.3 million units in 2020. During the same period, the installed base of remote tracking systems is forecasted to grow at a compound annual growth rate of 23.2 percent from 2.9 million units at the end of 2015 to 8.1 million units by 2020. Trailer tracking is the largest market segment, estimated to account for 56.8 percent of the total installed base of tracking units deployed on trailers and cargo containers in 2015. Intermodal container tracking is the second largest segment with an estimated installed base of 0.9 million tracking units at the end of 2015. ►



Installed base of active trailer and cargo container tracking units (World 2015–2020)

► Berg Insight ranks ORBCOMM as the largest provider of tracking solutions for cargo loading units, having a significant installed base of trailers as well as containers. The company has in the past years been highly involved in M&A activity related to real-time asset tracking, including notable acquisitions such as Euroscan and WAM Technologies. The latter was involved as a subcontractor in AT&T's major project for Maersk which has rolled out a system for real-time tracking of its entire fleet of 270,000 refrigerated containers. The project is one of the largest cellular-based industrial IoT deployments of its kind and effectively positions AT&T as one of the leading providers of tracking solutions for cargo loading units. The North American trailer telematics market is dominated by ORBCOMM, SkyBitz and Omnictracs which all have more than 200,000 active units, while Spireon and I.D. Systems have surpassed 100,000 units. The European trailer telematics market is considerably smaller and leading Europe-based players with 20,000–50,000 active trailer units include Idem Telematics, Blue Tree Systems, Schmitz Cargobull and Novacom. Mecomo and Agheera are strong vendors in the adjacent swap body segment. Other providers with more than 50,000 active units include FreightWatch International and Numerex, having the lion's share of their installed bases in the general cargo and container tracking segments respectively. Other major players in the container tracking space for example include Envotech and Savi Technology, while notable vendors in the segment of air freight cargo tracking include OnAsset Intelligence and Sendum Wireless. There are moreover providers offering tracking services based on disposable devices such as Zenatek.

Berg insight anticipates that there will be a strong focus on increased supply chain visibility and transport security in the coming years. Tracking of trailers and intermodal containers is increasingly common and technology advancements allow for ever-smaller logistics units such as individual pallets or cargo boxes to be tracked at a reasonable cost. Acceptance of remote tracking solutions will first be established in specific usage scenarios such as high-value, time-critical or refrigerated goods. Decreasing hardware costs, improved battery life and the emergence of LPWA technologies are expected to impact the market positively and foster wide-spread adoption of cargo tracking solutions in the coming years.

This report answers the following questions:

- Which are the leading providers of trailer and cargo container tracking solutions?
- What offerings are available from device vendors and service providers?
- What impact will international regulations and security initiatives have on the market?
- What are the key drivers behind the adoption of cargo tracking devices?
- What are the recent merger and acquisition activities on this market?
- What impact will technology advancements have on the market?
- How will the cargo telematics industry evolve in the future?

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Glossary



About the Author



Rickard Andersson is a Senior Analyst with a Master's degree in Industrial Engineering and Management from Chalmers University of Technology. He joined Berg Insight in 2010 and his areas of expertise include fleet management, LBS and vehicle telematics.

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